

### **Post Intake Meeting Case Note Example**

*This case note is an example only. All case notes should reflect the activities and events that occurred for the individual child/family. All entries to records shall be kept current and must be legible, dated and the author designated. If hard copy, the author shall sign and date the entry. For more information on the policies for recordkeeping please visit the Child and Family Connections Procedure Manual section on [Recordkeeping](#).*

EI

This writer completed intake meeting at family's home with mom (*name*). Together we reviewed the EI program, family rights, HIPAA, family concerns/priorities, cornerstone consent form, and consent for release to and from pediatrician (*name*) and evaluators. We reviewed EI evaluators and natural environments and mom requested (*therapists names*) to complete the evaluations at the family's home. Mom signed all necessary consent forms including cornerstone consent, informed consent/documentation of receipt of rights for family rights, documentation of receipt for HIPAA, and consent to release and obtain information from developmental therapist (*name*), and occupational therapist (*name*) and pediatrician.

We reviewed family fee and insurance. Mom provided me with a copy of her insurance card and she signed the insurance affidavit. We also reviewed the screening tool for All Kids and for DSCC. No referral to DSCC is necessary and the family is not eligible for AllKids based on the screening tool. We reviewed ASQ:SE and no social emotional needs or concerns were identified. We completed the family considerations page of the IFSP. Family priorities include...(*list family priorities/concerns*).

IFSP meeting was discussed and tentatively scheduled for...(*list date, time, and location of meeting*) if (*child's name*) is eligible for EI.

Name, SC